



**STATE OF MONTANA
SECRETARY OF STATE'S OFFICE
JOB DESCRIPTION AND EVALUATION**

SECTION I - Identification

Working Title:

Paralegal/Executive Assistant

Position Number:

32166004

Job Code Number:

232115

Division and Bureau:

Management Services

Job Code Title:

Paralegal Legal Assistant

Section and Unit:

Legal Unit

Pay Band:

5

Work Address and Phone:

State Capitol, 1301 6th Ave.,
Helena, MT 59620

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FLSA Exempt

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FLSA Non-exempt

Profile Produced By:

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Janice Doggett, Chief Legal Counsel

Date: August 2008

Description of the work unit:

The Secretary of State is one of six executive branch officers originally designated by the Montana Constitution of 1889. The duties of the secretary of state include: interpreting state election laws and overseeing elections; maintaining the official records of the executive branch and the acts of the legislature; reviewing, maintaining, and distributing public-interest records of businesses and nonprofit organizations; filing, publishing, and maintaining administrative rules adopted by state departments, boards, and agencies; attesting to the governor's signature on executive orders, proclamations, resolutions, extradition papers, and appointments; preserving the state seal; filing and maintaining records of secured financial transactions, such as liens; serving on the state Board of Land Commissioners and the Board of Examiners; and commissioning notaries public. The Secretary of State's office is divided into five work units: Elections; Business Services; Management Services; Administrative Rules and Notary Services; and Records and Information Management.

Purpose of the job:

This position performs professional paralegal duties for the Chief Legal Counsel in the Montana Secretary of State's Office and performs other duties assigned by the Chief Legal Counsel and Chief of Staff, including executive administration, research, staff support, etc. The duties of the position include preparing legal correspondence; preparing cases; tracking case materials, case progression and deadlines; preparing a wide variety of legal documents according to relevant court administrative procedures or other rules; organizing data and producing legal documents; and performing a variety of other executive administrative duties in support of the Chief Legal Counsel and Chief of Staff. This position reports directly to the Chief Legal Counsel and does not supervise other agency personnel.

SECTION II - Major Duties or Responsibilities

1. Duties	% of Time
<p>A. LEGAL SUPPORT SERVICES</p> <p>Provides technical legal services for the Chief Legal Counsel and other office staff to assist with the judicial process, including administrative procedures, trial, and appellate procedures; legal document preparation, and related legal activities. 60%</p> <ol style="list-style-type: none">1. Establishes and maintains legal records and data management systems to ensure availability, efficient access, and effective storage of public and confidential information and data. This includes records of legal correspondence, actions filed, official opinions, briefs and other documentation. Manage both manual and automated records systems including determining directory structures, developing and monitoring access and return procedures, and ensuring compliance with records retention and disposal requirements.2. Receives, tracks and docketed all legal correspondence received to ensure accurate documentation of legal processes, and to assist the Chief Legal Counsel and other staff in tracking and meeting legal deadlines. This includes evaluation and docketing of a variety of legal correspondence including briefs, appeals, discovery documents, rules, legislative process and hearings, and related. Calendars all events and documents, including dates, times, locations of verbal arguments, deadlines for briefs, hearings, extensions, etc.3. Manages legal references by ordering and updating publications, and upgrading research material to ensure the availability, currency and efficient access and return of legal information resources. This involves organizing existing and new materials according to established legal reference systems, coordinating purchases and disposal as directed, and tracking materials to ensure the security and availability of legal library resources.4. Responds to requests for information from various sources by gathering requested documents, identifying factual information and distinguishing from confidential information, and investigating facts as directed by the supervisor.5. Reviews case and legislative files and prepares written summaries of hearings and interviews, depositions, transcripts, chronology of orders, summaries of contacts and other related information at the direction of the supervisor. Locates documents and information as needed.6. Monitors deadlines set by statute, court order or the legislature. This involves creating and using tracking systems to record relevant information, run reports, summarize information, prioritize workload, and meet strict deadlines. Meets with the supervisor to set schedules and track timelines for name contests, legislative hearing, administrative hearings, and court hearings.7. Conducts legal research at supervisor's request through manual and electronic methods. Identifies appropriate laws, judicial decisions, legislative history, legal articles, and other materials that are relevant to issues involved based on guidance from the Chief Legal Counsel.8. Drafts documents at the request of the supervisor, including formal notices, pleadings, affidavits, discovery documents, bill sponsor notes, and other related legal	

references. Ensures all legal requirements are met; drafts and edits documents to ensure accuracy and consistency.

9. Prepares correspondence related to notices or orders to obtain information, documents or materials for litigation counsel, the Attorney General, or other staff members, etc. and coordinates review, edits and approval for the Chief Legal Counsel.

B. EXECUTIVE ADMINISTRATIVE SUPPORT

This position coordinates and oversees a variety of administrative tasks in support of the Chief Legal Counsel. These duties include research, writing, transcribing, and editing a variety of memoranda, correspondence and informational materials. Arranges and participates in meetings, researches and organizes project information, proofreads correspondence and other written materials, maintains individual and electronic mail accounts and schedules, coordinates travel arrangements, generates reports from agency databases, monitors timelines, and provides a wide range of other executive support activities and tasks. **35%**

1. Coordinates and oversees a variety of administrative activities among Executive staff including training, information dissemination, meetings and other activities.

2. Develops a variety of financial, legislative, program and summary reports by interpreting requests, identifying appropriate data sets within agency and statewide databases, and compiles summary reports for distribution.

3. Arranges and participates in office meetings, conferences, and other gatherings by providing logistical support, coordinating schedules, meeting rooms and equipment, and providing notification as needed.

4. Researches and organizes information for various projects, meetings, reports and presentations for the Chief Legal Counsel. Interprets, summarizes and prioritizes specific information needs and appropriate information sources. Conducts searches to locate relevant information.

5. Coordinates travel arrangements for the Chief Legal Counsel to provide appropriate and cost-effective travel itineraries, accommodations and other arrangements in accordance with state regulations and rules. Prepares monthly travel expense reports.

6. Prepares or edits a variety of memoranda, correspondence, technical or informational materials and other documents for style, grammar and content to ensure accuracy and completeness of language as well as proper business and technical document formats as appropriate. Reviews and analyzes incoming correspondence and other written material to determine significance, distribute as appropriate, and/or take action by preparing responses, RSVP, etc. as directed by the Chief Legal Counsel.

7. Maintains executive calendars for Chief Legal Counsel to inform of upcoming events, project deadlines, travel itineraries, and other schedules. Assists in resolving scheduling conflicts and event timelines when necessary.

C. Other Duties:

05%

This position performs a variety of other duties as assigned by the supervisor in support of the agency mission and work unit objectives. These include exchanging information with agency staff and the public; providing training, education, and professional and technical

assistance; directing special projects; participating in ongoing training and educational programs; representing the Secretary of State's office on multi-state working groups and committees; and performing a variety of other duties as directed.

2. Specific examples of problems solved, decisions made, or procedures followed when performing the most frequent duties of this position include:

Problems and decisions relate to developing tracking systems for legal and legislative documents, monitoring deadlines, communicating with other state agencies, individuals, the courts or the legislature to gather relevant information, responding to requests, indexing and drafting responses to requests for information or providing summary analysis for the Chief Legal Counsel, and conducting legal research.

3. Guidelines, manuals, or written procedures that support this position include:

Available guidelines, manuals, and written procedures available to the incumbent include MCA, standard legal references, law library reference procedures including legislative histories, formal opinion processes, litigation process and case procedures, rules of civil procedure, rules of evidence, and computerized case activity search tools.

4. Which of the duties and/or specific tasks listed above are considered "essential functions" that must be performed by the incumbent in this position (with or without reasonable accommodations)?

The following duties are considered essential functions because they require specialized expertise and skill and are the primary reasons the job exists:

Duty A: Legal Support Services
Duty B: Executive Administrative Support

The following mental and physical demands are associated with these essential functions:

Physical:

- Light lifting (less than 10 lbs.)
- Carrying light items (papers, books, small parts)
- Remaining seated for extended periods of time, with occasional walking, standing, and bending
- Traveling within the state to project locations, and traveling out-of-state by airline to national conferences and meetings
- Operating a personal computer
- Communicating in writing, in person, and over the phone

Mental:

- Dealing with the public on a regular basis
- Ability to multi-task
- Meeting demands for accuracy in all aspects of work
- Ability to meet inflexible deadlines
- Computing arithmetic operations
- Comparing data
- Compiling information
- Analyzing, synthesizing
- Coordinating
- Negotiating

5. Does this position supervise others? ☐ Yes



No

Number of employees directly supervised:
Complexity level of the positions supervised:
Position number(s) of those supervised:

6. This position is responsible for:

- | | | | |
|-------------------------------------|-------------------------------------|---|------------------------------------|
| <input type="checkbox"/> Hiring | <input type="checkbox"/> Firing | <input type="checkbox"/> Supervision | <input type="checkbox"/> Pay Level |
| <input type="checkbox"/> Promotions | <input type="checkbox"/> Discipline | <input type="checkbox"/> Performance Management | |
| <input type="checkbox"/> Other: | | | |

7. Attach and organizational chart.

SECTION III - Minimum Qualifications

Critical knowledge and skills required for this position:

KNOWLEDGE:

This position requires knowledge of work flow management; manual and computer tracking database systems; organizational methods and techniques; production of legal documents; legal terminology; word processing software functions; Montana Code Annotated; computerized case activity search tools; standard legal references; standard and law library reference procedures and research; general and legal office practices and procedures; correct spelling, grammar and punctuation; the litigation process and case procedures; the legislative process; rules of civil procedures; Montana District Court rules; rules of evidence; submission procedures for motions and exhibits; and legal writing using correct legal citations and terminology. Must also have an understanding of confidentiality limitations regarding sources of information and attorney/client privileges.

SKILLS:

This position requires skills in legal research methods and techniques, preparation and use of legal documents, administrative and court procedures, and relevant computer software and equipment. This position also requires skill in drafting legal and legislative documents; skill in communicating verbally and in writing; the ability to follow verbal and written instruction; the ability to create tracking systems, calendars and filing systems; skill in creating document formats; and skill in proofreading legal and legislative documents, letters, etc. for legal content, style, proper citations, grammar and format.

Behaviors required to perform the duties of the position:

Verbal communication:

- Keeps appropriate individuals informed
- Listens to others respectfully
- Understands or seeks clarification
- Responds appropriately demonstrating tact and diplomacy
- Expresses thoughts and ideas clearly

Written communication:

- Writes clearly, logically, and effectively using proper style, tone, grammar, spelling, and punctuation.

Flexible at Work:

- Responds positively to changes in direction, priorities, responsibilities, personnel, or assignments.

- Works effectively in a variety of situations and with a variety of individuals or groups.

Working with Others:

- Relates to others in an open and accepting manner; is approachable
- Offers and accepts opinions constructively
- Adjusts to how individuals and work unit will react
- Treats others with respect
- Constructively resolves disagreements
- Is open to others' ideas and gives credit and recognition to others

Responsive to Work Needs:

- Willing to perform different jobs, cross-train, or assist wherever needed
- Is aware of co-worker workload and responds accordingly.

Takes Action:

- Takes effective and appropriate action to perform job duties without being reminded
- Willingly accepts more responsibility or more work

Forward Looking:

- Suggests improvements and new ideas, technologies, and approaches
- Willingly applies new and evolving ideas, methods, designs, and technologies to work

Efficiency and Focus:

- Uses time effectively and prioritizes tasks
- Is aware of workload and makes appropriate adjustments to meet deadlines and complete tasks
- Handles interruptions or distractions and stays on task
- Achieves goals

Accuracy:

- Ensures accuracy of work and makes corrections in a timely manner
- Is conscientious and monitors own quality of work

Attendance:

- Arrives on time for work and demonstrates good attendance record

Organizational Awareness:

- Understands and follows the rules, policies, and laws that govern work
- Identifies key decision-makers; understands and respects the balance of authority
- Acts in an ethical manner

Education and experience:

Check the box that indicates the minimum level of education needed for this job.

- ☐ No education required
- ☐ High school diploma or equivalent
- ☐ 1 year job-related college or vocational training
- ☐ 2 year job-related college or vocational training
- ☒ College degree (Bachelor's)
- ☐ Post-graduate degree or equivalent (e.g. Master's, JD)

List the acceptable fields of study or necessary knowledge and skills: Paralegal Studies, Law, Political Science, Business Administration, Communication, or related area

List any other training, certification, or licensing required: proficiency in WORD and EXCEL;
Executive/legal secretary or related training.

Check the box that indicates the minimum amount of job-related work experience needed as a new employee on the first day of work.

- ☐ Limited (0 to 1 years of job-related work experience)
- ☒ 1 to 2 years of job-related work experience
- ☐ 3 to 4 years of job-related work experience
- ☐ 5 or more years of job-related work experience

Other specific experience needed for this job: This position requires 2 or more years of job-related work experience in addition to the education noted above, or equivalency.

This agency will accept alternative methods of obtaining necessary qualifications:

- ☒ **Yes**
- ☐ **No**

Acceptable alternative qualifications include: variation in job-related work experience and education combinations to equal 4 or more years of directly related experience and educational equivalency.

SECTION IV – Other Important Job Information

Work is performed in a normal office environment, and the position requires the ability to communicate effectively in person, in writing, and over the phone. Work hours vary in complying with numerous deadlines, customer requests, interruptions, and wide fluctuations in work volumes, and deadlines require the employee to be able to work under pressure for long periods of time.

SECTION V – Signatures

My signature below (typed or hand written) indicates the statements in Section I to IV are accurate and complete.

Employee:

Signature	Title	Date
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Immediate Supervisor:

Signature	Title	Date
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Deputy:

Signature	Title	Date
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Department Designee:

Signature	Title	Date
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Human Resources Review:

My signature below (typed or hand written) indicates that Human Resources has reviewed this job description for completeness and has made the following determinations:

- | | |
|--|--|
| <input type="checkbox"/> FLSA Exempt | <input checked="" type="checkbox"/> FLSA Non-exempt |
| <input type="checkbox"/> Telework available | <input type="checkbox"/> Telework not available |
| <input type="checkbox"/> Classification complete | <input type="checkbox"/> Organizational chart attached |

Signature	Title	Date
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